JOINT THEATER KNOWLEDGE MANAGEMENT (JTKM) 2005 CONFERENCE
7-9 March 2005

Effective Portal Development

Presented by
Sandra Seligman, USEUCOM EPOC-ISKM

Effective Portal Development

"Internet Portal Guide"

By

David Viney

- Before
  - Vision, Sponsorship, Business Case
- During
  - Management, Change Control, Pilots & Pioneers
- After
  - Support, performance, Post Investment Appraisal

Before

- **May well be the first and last project that touches every individual in your organization.**
- **Has the power to transform your organization and make a significant contribution to your mission.**
- **Will need wide and popular support.**
- **Brings great exposure (visibility!) to participants.**

Before

- Getting Started
- Intranet Vision
- Portal Sponsorship
- Influencing for your Intranet
- Intranet Portal Architecture
- Intranet Business Case/ROI
- Intranet Prioritization
- Mobilization of your Intranet project

Before – Getting Started

- **Gather like-minds for support**
- **Obtain your License to Operate**
- **Mobilize your Forces**
  - Establish Office Space
  - Provision you Team
  - Obtain Dedicated Team Members
- Prepare Your Strategy
- Consider Your Tactics

Before – Intranet Vision

- Fact - The portal improves on a traditional intranet by 'bringing together in one place all the (web based) information and tools you need to do your job, readily accessible and easy to use‘
- **Vision - ? For *your* Organization ?**
  - “***Simple*** and ***Compelling***” vision of what the portal means to your Organization.
  - Support your ***Business Case***

Before – Portal Sponsorship

- Bears Repeating: *May well be the first and last project that touches every individual in your organization.*
- Do NOT:
  - Lead from Middle Management
  - Start small and hope it catches on
  - Recruit a single Sponsor
- Do:
  - Multiple Sponsors (technical, functional, HR,…)
  - Find Natural Allies
  - Find and Understand (Neutralize) your Natural Opponents

Before - Influencing for your Intranet

- Build a solid business case, BUT…
  - *Some business decisions get make without a good ROI/Business case.*
- Three Factors that play in Decision Making
  - Rational (ROI/Business case)
  - Emotional
  - Political
- Research Key Decision Makers - Emotional needs & Political Agendas
- Stakeholders

-- continued

Before - Influencing for your Intranet

- Stakeholders
  - Primary stakeholders are those who are ultimately affected by the project, i.e. who expect to benefit from or be adversely affected by the change.
  - Should all have a representative participant in your *Project Governance*.
  - **Stakeholder Analysis**
    - ✓Make a list of all Stakeholders across org.
    - ✓Determine their Interests, importance and influence
    - ✓Assess their ability to participate and find ways to involve them

Before - Intranet Portal Architecture

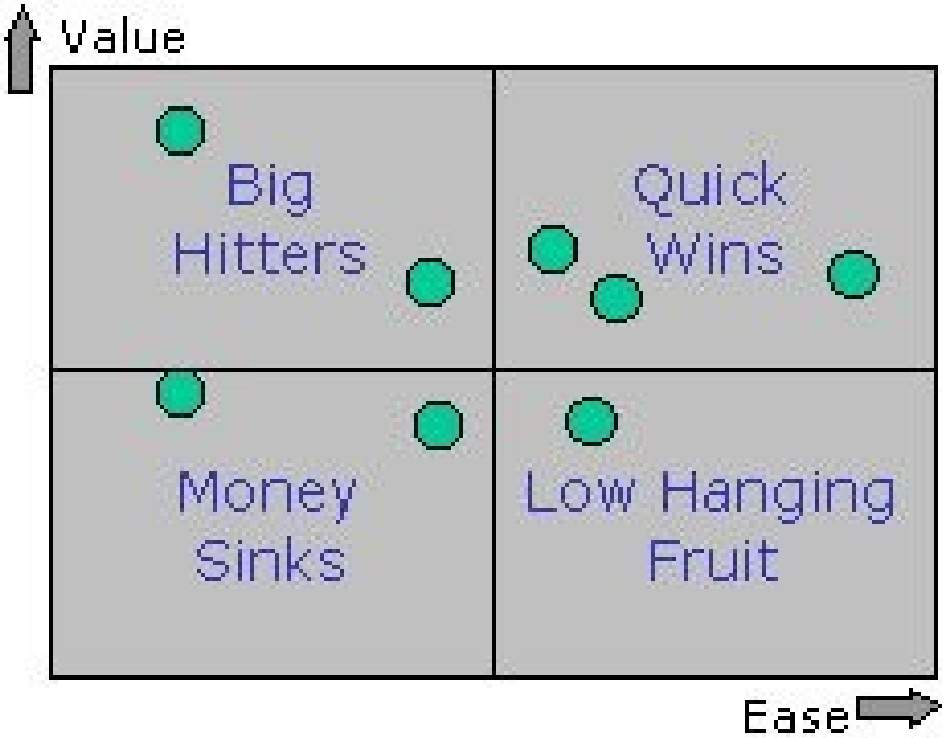
- **Architecture is dependent on your business and *perhaps* your *current* technical solution.**
  - **Custom applications**
  - **Databases**
  - **Legacy applications**
- **Hire or Contract Experienced Engineers to design your Technical Solution – "*vender independent*".**
- **Involve experienced stakeholders in your requirements analysis.**
- **Technical solution can become the glue that links your legacy and enterprise investments together.**
- **Must continue to evolve technically.**

Before - Intranet Business Case/ROI

- Hard Cost/Benefit Analysis Difficult to Develop:
  - Reduced printing and distribution cost
  - Decommissioning legacy intranets
- Soft Benefits:
  - Improved employee satisfaction
  - Improved communication
  - ***Quicker access to information***
  - ***Accurate information sharing***
  - Individual control over information sharing

Before - Intranet Prioritization

- **Infrastructure is first and mandatory**
- **Prioritize on Net Present Value (business model)**
- **Prioritize on Strategic Objectives (military model)**



Before - Mobilization of your Intranet project

- Pick your people:
  - Technical - If using established vendors' products it will not be technically difficult. Find people experienced in the technical solution.
  - Management – High propensity for scope-creep – need tough managers that will hold the line.
- Centrally locate team – will work will entire organization
- Supply your team adequately
- Name your project for success – fit your business style

During

- Project Team
- Project Management Methodology
- Project Governance & Reporting
- Intranet Project Plan
- Development Methodology
- Intranet Communications Plan
- Business Change Management

During

- Intranet User Training
- Pilots and Pioneers
- Managing Risks and Issues
- Project Change Control
- Benefits Realization & Tracking
- Financial Management

During – Project Team

- A clear sense of purpose
- Shared “vision”
- Management process is clear and well defined (bur flexible enough not to stifle creativity)
- Evaluate team structure and rebuild as necessary
- Separate project assurance group to ensure quality control
- Proper balance of technicians at different levels

During - Project Management Methodology

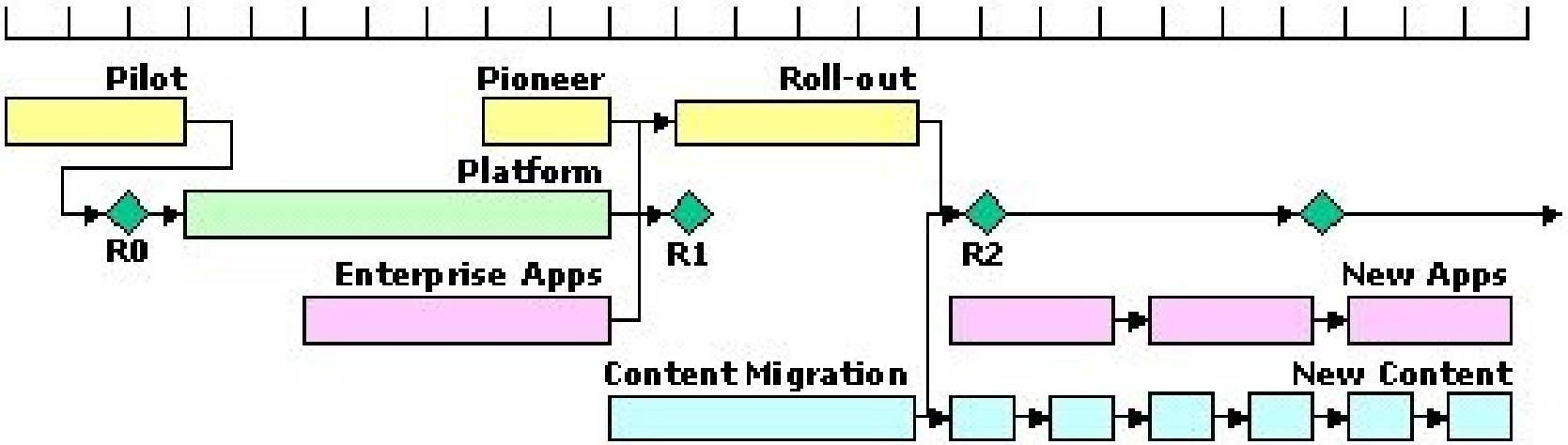
- A (non-specialist) Project Management Methodology (PMM) includes two key elements:
  - The Project Management Framework which defines how all the different products should be managed.
  - The Management Tools that one would expect to find in any well managed and sizeable project.

During - Project Governance & Reporting

- Your portal project will include everyone in your organization, from the CEO/Commander to the newest recruit. It will cover every geography, business unit and central or corporate function.
  - governance will need to be equally inclusive (with representatives drawn from every part of your organization).
  - **Steering Group** – represented by all major functions
  - Senior, key users.
  - Possibly representative from collateral organizations

During - Intranet Project Plan

- **"Even a poor plan is better than no plan at all."** - Mikhail Chigorin, chess genius



Web technologies and standard project development plan should be followed.

During - Development Methodology

- Traditional **Waterfall** method is recommended for your bedrock – the Infrastructure
  - Not easily changed without disruption of apps that depend on it
  - OS, security, caching, storage, DB
- For content and applications, **Rapid Application Development**
  - Quick population with content and applications
  - Iterative and parallel
  - Portal apps, document management, apps

During - Intranet Communications Plan

- Start with your proposal
  - Consistent message among audiences
  - Keep every level informed of progress
  - Regular program/progress updates
  - Key Audiences
    - ✓Don’t forget results of Stakeholder Analysis
    - ✓Steering Group
    - ✓Users
    - ✓Development team
    - ✓Others…

During - Business Change Management

- “the normal result is that things get worse first. Why? Because you've upset the system. You've introduced instability and change into a system that (albeit sub-optimally) operated on comfortable and well-established habits. It takes time for people to get used to the new portal!”
- Surviving the dip:
  - Manage Expectations
  - Minimize disruption
  - Change Management Approach
    - ✓Develop a change plan
    - ✓Assess specific resistance & Readiness
    - ✓Establish specific support plan

During - Intranet User Training

What we have to learn to do, we learn by doing." -- Aristotle (384-322 BC), Greek philosopher)

- Web applications highly intuitive
- However, formal user training may well be required on your project in a number of areas that are, perhaps, less intuitive .
- Training Plan
  - Define intuitive areas
  - Define more complex areas
  - Plan and train accordingly
- Friendly training resources readily available, remember not all of your employee grew up with desktops.
- Utilize training resources provided with your applications & by vendors.

During - Pilots and Pioneers

- Pilot – experiment, success is success, failure is success.
  - testing it with the right community.
  - select an area (or areas) that is representative of the organization, but sufficiently small to keep costs down, avoid bad publicity and better observe the results
  - Acceptance criteria – well defined, strict analysis.

- Pioneer – no going back, your first real version.
  - Purpose - allow you to iron out those last minute wrinkles.
  - Your Pioneer community will be your first advocates. Therefore, the opposite logic to the pilot applies; you should go for a higher risk community that are more visible across the organisation (perhaps working cross-functionally).

During - Managing Risks and Issues

- **Inherent (Business) Risk**
  - risk that exists in the environment around your portal project. It will tend to be unique to your organization
- **Project (specific) Risk**
  - the risk specific to your portal project.
- **Stage Risk**
  - risk associated with the particular activity of any given phase of the project plan

– continued

During - Managing Risks and Issues

- **The Risk Log & Risk Plan**
  - Formal log of all identified risks
  - Mitigation plan – counter-measures
  - Risk assessment
  - Issues Log
    - ✓ It may well be convenient to use the Risk Log to also track any issues on the project. Issues will generally fall into a general category

During - Project Change Control

- Frequent, unwarranted changes in direction are likely to de-motivate the team, confuse your stakeholders and cause costs to escalate.
- Implement a Change control process
- Change what is not working when you can
- Document the rationale to make changes in your plan
- Re-cost in time and other resources

During - Benefits Realization & Tracking

- Benefits Blueprint/Realization Plan
  - A good starting point for benefits tracking is to agree (early on in the project) a Benefits Blueprint, which converts the vision into a set of objective terms.
  - Build on Communications plan.
  - Measurable changes that can be tracked
  - Core elements
    - ✓Benefit Description
    - ✓Responsible Business Area
    - ✓Key performance Indicators

During - Financial Management

- Sound financial management has two over-riding benefits;
  - it gives great confidence to project sponsors and
  - it can be a very useful tool to control project scope, get more delivered and ground the team in commercial realities .
- Monthly or Quarterly Financial reports
  - On/Off track
  - Overruns (under runs)
  - Financial impact of Scope Change
  - Funding Scope Change

After

- Steady State Governance
- Steady State Support Organization
- Steady State Funding Model
- Measuring Performance
- Post Investment Appraisal

After - Steady State Governance

- Continual Improvement/Additional Functionality
- Continual Technical Advancement
- The Central Maintenance Team
  - Retain a core from development team
  - Exploitation
    - ✓Re-use investments and knowledge gained from initial project
    - ✓Steer secondary sites/additional functionality
- Day-to-Day support, training, maintenance

After - Steady State Support Organization

- Tier One Support
  - Helpdesk – first line of support for all ***Intranet*** issues
  - Resolve immediate problems, answer user questions
- Tier Two Support
  - ***Portal*** problems only
  - Problem management/tracking
- Tier Three Support
  - Portal Problem Resolution
  - Identify Required System Enhancements
- ***Configuration Management*** of particular importance

After - Steady State Funding Model

- Essential Infrastructure Investments
  - Scaling of HW, Networks, Software (i.e., licensing)
- Platform Maintenance and Support
  - costs of supporting, maintaining & upgrading core portal components
- The Central Portal Team
  - govern the steady state portal and take care of the primary infrastructure
- Small Change provision
  - Ongoing minor enhancements
- Large Change Provision
  - New functionality developments

After - Measuring Performance

The only thing worse than being talked about is not being talked about.
Oscar Wilde (1854-1900)

- On time and On Budget
- Decent user adoption rates
- Something of significant value for them to use
  - Typical measures include who is looking at a particular page or object, by grade, department or business unit.
  - **Map back to your original Business Case**

After - Post Investment Appraisal

- Project-closure Review
  - Near end of project
  - Agree when the project will end
  - Ensure that the business-as-usual teams are read and willing to accept the system, process and organizational changes the project has effected.
- Post-implementation Review
  - 6-9 months after project end
  - Lessons learned, ensure good is repeated, bad avoided
- Post-investment Appraisal
  - > 18 after project ends
  - Measure return on investment
  - Plan for future projects

Sources

- **The Intranet Portal Guide, David Viney,**
  http://www.viney.com/DFV/intranet_portal_guide/index.html

Copyright Notice

The "Dig for Victory" Intranet Portal (Deployment) Guide
Copyright © David Viney, 2003